Citrix Service Provider Onboarding Guide

Sign-up!   30 days   60 days   Transact!

Welcome → Onboard → Plan → Market (Marketing Managers) **→ Report**

Implement (Solution Architects & Engineers) **→ Sell** (Sales Managers and Representatives)

- Maintain Microsoft SPLA partnership (for on-prem deployments)
- Maintain employees' log-in credentials in Partner Central
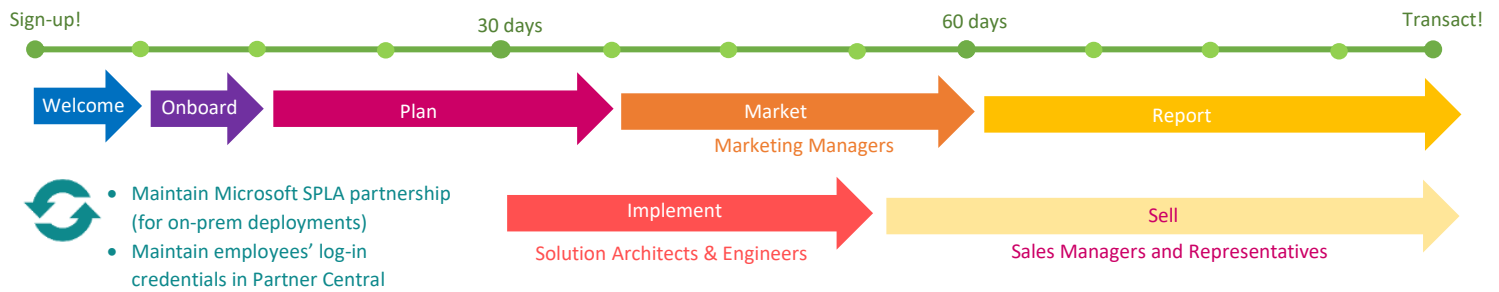
Welcome (week 1)

- Manage your account in Partner Central
- Join the Citrix Service Provider community
- Receive an overview of Citrix & the CSP Program Value
- Review the CSP Program Guide and CSP Partner Tiers
- Register for a CSP Launch Webinar
- Reach out to your Citrix Onboarding Representative

Onboard (week 2)

- Review Citrix Resources and log-in to all platforms
- Register for monthly CSP Channel Update Webinars (even if you can't attend live)
- Make plans to achieve your technical certification
- Review the Citrix Products and CSP Licensing

Plan (weeks 3-5)

- Create your CSP business plan and review with your Partner Account Manager
- Create a press release for your new Citrix partnership

Implement (weeks 4-7)

- Review technical training on building your CSP business
- Design and build using the reference architecture
- Order your licenses and set up license usage insights tool

Market (weeks 5-6)

- Review training on how to use MarketingIQ and the Cloud Journey Campaign for CSPs
- Develop your marketing plan and materials

Sell (weeks 7+)

- Review sales trainings and the Cloud Journey Campaign sales guide
- Explore sales resources like telescripts and use cases
- View competitive intelligence information on the products you're selling

Report (week 8)

- Submit your first monthly usage report by day 60 (even if usage is 0)

Welcome

1. **Update your partner account and contacts in Partner Central**

Partner Central is your main hub to capitalize on your Citrix partnership. Within Partner Central, you can setup and maintain your partnership details as well as access the program, sales, marketing and technical systems and resources.

Ensure your partner account is setup with Citrix:

- [Access Partner Central](#) and enter the login credentials you were provided
- Click on "Update Locations, Contacts, and Memberships" in the upper right side of the screen
- Review the Organization Summary, Locations, and Program memberships tabs to ensure all info is correct
- Under the Manage your contacts tab, click on the My Information subtab and verify your contact information and communication preferences are correct
  TIP: For the best enablement experience, be sure to allow Citrix to email you and call you in the communication preferences at that bottom of the page

[Administrators] Ensure your team can access Citrix resources: (create named partner contacts)

- Go to the [Manage your Contacts](#) tab in Partner Central
- Under the subtab Contact List, click create Contact button above the right side of the contact table
- Complete the form for each contact in your organization that will be involved in the Citrix CSP business
- Once you add them as a contact, he/she will receive an email with a username, prompting them to create a password for their account
  TIP: As people within your organization change, don't forget to update the company information in "My Account" accordingly.

Link your Citrix certifications to your account:

- From the Partner Central homepage, click "My Account" in the upper right side of the page
- On the Dashboard, navigate to the "My Certification Manager" on the left side of the page
- Launch the certification manager tool
- Add your Candidate ID # to link your certification to the account

2. **Join the Citrix Service Provider community**

To ensure you stay in touch with us and up to date on the latest announcements going forward!

- [Join the LinkedIn Group](#)
- Follow on twitter @CitrixCSP
- Subscribe to the [Citrix Service Provider Blogs](#) (upper right corner of blog site)

3. **Learn about Citrix in General and the CSP Program**
- Review Modules 1.1 and 1.2 in the [CSP Learning Path](#)

4. **Review the CSP Program Guide & CSP Tiering Program**
- Review details and requirements associated with each of the [CSP Partner Tiers](#)
- Watch Module 1.4 in the [CSP Learning Path](#) to learn about important program specifics
- Read up on additional details about the CSP Program in the [CSP Program Guide](#)

5. **[Marketing, Sales, Business, & Technical] Register for upcoming CSP Launch Webinar**

Every month, we hold a 1.5 hr webinar for new partners (or current partners that just need a refresh), which covers an overview of Citrix resources, marketing and business planning best practices, and an overview of all the Citrix products/services available to you – presented by one of our Systems Engineers! Get all your business ad technical questions answered! **Register yourself and your team members here (you only need to attend once)**

6. **Connect with your Citrix on-boarding representative**

Email csp@citrix.com if you are not sure how to contact your Citrix CSP Onboarding Manager.

Onboard

1. **Review Citrix Resources and log-in to SalesIQ, ECC, and Elearning.citrix.com**

Review all the Citrix Resource platforms (Module 2) and log-in to the following to ensure your access rights are correct for future enablement initiatives:

- SalesIQ
- Enablement.citrix.com (also called ECC)
- Elearning.citrix.com

2. **[Marketing, Sales, Business, & Technical] Register for CSP Monthly Channel Updates**

Each month we hold a 1 hr webinar to discuss any program, product, marketing, or enablement announcements specific to CSP. We feature partner case studies as well as product/service overviews.

Even if you cannot attend, be sure to register for all upcoming webinars so you receive an email with the recording, directly to your inbox! Make sure all CSP stakeholders are registered for these webinars as well.

- **Register Here**

3. **[Marketing managers] Register for MarketingIQ**
   1. Access http://citrix.zift123.com/
   2. Click Register Now at the top of the page
   3. Complete your information with your work email address
   4. You will receive access via email within 2 business days

4. **Make plans to achieve your CCP-V (or other appropriate technical certification) within 3 months**
   - If you will _not_ be hosting Citrix Virtual Apps or Desktops, then you will need to obtain a certification other than the CCP-V. See this document for details.
   - For the CCP-V, navigate to elearning.citrix.com, select INSTRUCTOR-LED, and click on the Certifications tab
   - Explore requirements and plan for at least one person in your organization to achieve the CCP-V certification

     1. Attain the CCA – V certification.
     2. Review the 1Y0-311 Citrix XenApp and XenDesktop 7.15 Advanced Administration Exam Prep Guide.
     3. Prepare with the recommended training:
         CXD-310: Citrix XenApp and XenDesktop Advanced Administration OR
         CMB-310: XenApp, XenDesktop, and Provisioning Services 7.1x Administration (Fast Track) AND
         CXD-303: Citrix XenApp and XenDesktop 7.1x Optimization and Troubleshooting
     4. Pass the 1Y0-311 Citrix XenApp and XenDesktop 7.15 Advanced Administration exam.

   - You should see a 20% off discount on courses listed on training.citrix.com, once you sign-in with your credentials.

5. **Get trained on CSP Licensing**
   - View Licensing Overview video (5 mins) on ECC
   - Review CSP Licensing Guide on SalesIQ

6. **View an overview of Citrix Solutions**
   - Review Citrix Product Overview (Module 4) for a quick highlight of the solutions/services you could add to your service portfolio.

Plan

1. **Define your service offerings**
   - Review Module 5 in the CSP Learning Path to learn about Business Planning & Specialization
   - Complete this business planning exercise with the stakeholders from all parts of your organization
   - Learn more about specializing and expanding your portfolio with additional business planning resources on SalesIQ > Go to the Grow & Sell page

2. **Review your business plan**
   - Engage with your partner account manager or distribution account manager to discuss your business plan
   - Set an official launch date

3. **Tell the world!**
   - Release a press release notifying your community of your new Citrix partnership
   - Follow these guidelines

Implement

This is the stage where your technical team will need to get involved, if they have not been already.

1. **Understand the technical structure of hosting Citrix solutions**
   - Watch the CSP Technical Overview Training video
   - Review the CSP Reference Architecture Interactive Guide

2. **Design and build using the reference architecture**
   - Find all CSP technical resources on the Technical page of the CSP SalesIQ Portal
   - Have a question? Ask a Citrix SE in the SalesIQ technical forum!
   - Stand up your own demo environment using the Citrix Demo Center (see page 15 in the CSP program guide for more details)

3. **Learn about the value of Citrix Smart tools**

   Citrix Smart Tools are a collection of easily consumable services that empower Citrix Administrators to efficiently operate the Citrix stack, on-premises or in the cloud. Integrated into a unified console delivered via Citrix Cloud, Smart Tools facilitate automated deployment, usage-based scaling, simplified migration and proactive health checks for Citrix workloads.

   - To get started, watch the Smart Tools training video
   - Then, use this guide to demo Smart Tools in the Citrix Demo Center

4. **Order your licenses from Partner Central**
   - Review the CSP Licensing Guide
   - Follow these instructions to order licenses

5. **Set up your license usage reporting**

   The License Usage Insights (LUI) Service in Citrix Cloud is a free cloud service that helps CSPs understand and report on product usage. LUI is a valuable tool for CSPs because it assists with reporting accuracy, trend analysis and business insights, and simplifies reporting across your entire CSP business.

   - Watch the training on how to get started with LUI
   - Review LUI security and privacy facts
   - Download the latest Citrix License Server software
   - Sign-in to Citrix Cloud or create a free account
   - Tag/ Link your users to your customers in LUI by clicking the three ellipses on the right of a user record
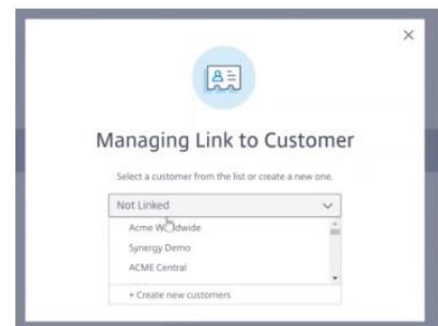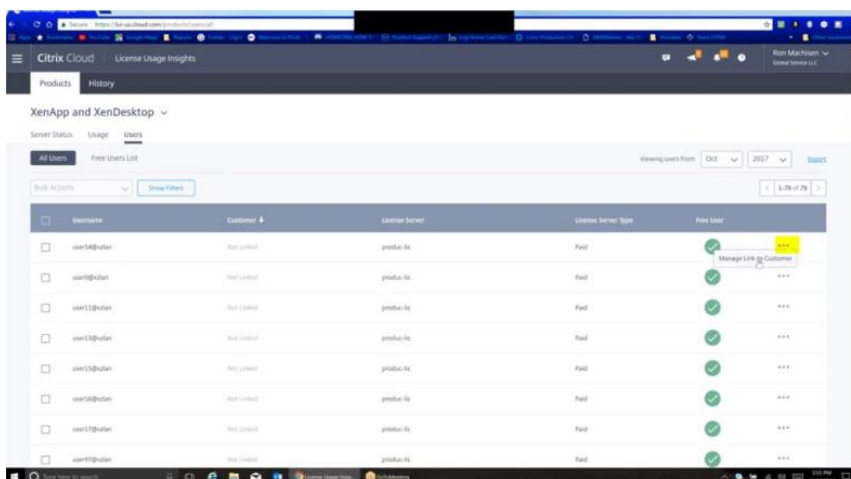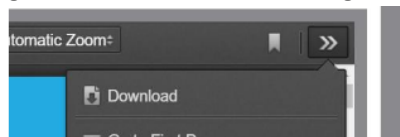
Market

Marketing your services is made easy with the free Citrix MarketingIQ platform, which not only allows you to customize ready-to-use content, but you can deploy email and social media campaigns right from the tool as well. By now you should have received access to MarketingIQ. If you forgot to register for an account earlier, you can do so here http://citrix.zift123.com/ and you will be approved within 2 business days.

1. **Review the CSP Marketing Basics**
   - Review how to create a CSP Marketing Plan
   - Watch the CSP Marketing Overview (Module 3) to learn what's available for you to leverage

2. **Discover what's available**
   - Watch the Cloud Journey training on ECC to understand how you can leverage an amazing campaign, made for CSPs! This training also covers how to get started using MarketingIQ
   - Review the Cloud Journey Campaign Activation Guide
     HINT: Use the toggle in the upper right corner to download the guide for easier reading!

   - Check out the Marketing Kits – full of branded HTML emails, banners, tele-guides, and customer facing decks!

3. **Set-up and explore MarketingIQ**
   1. Log-in to MarketingIQ and click Step 1 on the homepage to begin your activation plan
   2. Complete your profile
   3. Then, create your lead landing page
   4. Next, setup your social media in MarketingIQ
   5. Finally, explore the available campaigns within MarketingIQ that align to your target market and services, like the Cloud Journey Campaign assets

4. **Explore the Partner KickStart Guides on SalesIQ**

Find additional marketing collateral around Citrix Workspace, ADC, and SD-WAN by exploring our new Citrix Partner Kickstart guides. In addition to key enablement activities, you'll find marketing content and tactics based on proven best practices for lead generation and sales acceleration.

5. **Develop your marketing plan and materials**
   - After reviewing all the resources available and planning the services you will go to market with, develop a 6 month marketing plan with activities
   - Review this plan with your partner account manager or distribution account manager

Sell

1. **Get trained on Citrix sales basics**
   - Watch the [CSP Sales training](#) video
   - Review [CSP Sales training deck](#) to better understand use cases and what to listen for when talking with your customers
   - Watch [Module 6 of the CSP Learning Path](#) to hear real-life scenarios and best practices from other CSP partners

2. **Explore the sales tools and resources available to you**
   - Review the [cloud journey sales enablement guide](#) so you can be familiar with the marketing messaging
   - Explore [sales resources on SalesIQ](#), like telescripts and use cases
   - Review [competitive intelligence information](#) on the products you're selling

3. **Prepare yourself for customer conversations**
   - Print out the [partner sales battle card](#) with products and use cases
   - Set up regular call cadence with your Citrix Partner Account manager or Distribution Account manager for assistance with pipeline management

Report

1. **Review the usage and reporting section of the [CSP Licensing Guide](#)**

2. **Submit your first monthly usage report by day 60, even if usage is 0**
   - Contact your distributor to understand how they prefer to receive your usage reports
   - For customers with over 500 users, you must include customer name, address, and country
   - Reports are due to your distributor on day 10 of every month